SPS Workday Retro Reclasses and Payroll

Retro Reclass Process and Acting Capacity Overview for Timekeeping and Payroll Go-Live

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SPS Overview

- ✓ Phase II:
  - ✓ Workday TimeTracking and Absence
  - ✓ Automation of ETR/PTR Process
  - ✓ Gross Payroll Process

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HR Events that impact payroll:

- ✓ Reclasses
    - ✓ Retroactive Reclasses
    - ✓ Acting Capacity
    - ✓ Rate Change on Contract

- ✓ New Employees

- ✓ Transfers

- ✓ Promotions to New Position

- ✓ Demotions

- ✓ Reassignments

- ✓ Terminations
    - ✓ Retirements
    - ✓ Others

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System Integration:

✓ Transactions in Workday

✓ CPB Employee Files (HR and Benefits)

✓ CPB Gross Payroll

✓ Schedule

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Retro Reclass Process

✓ Edit Position Restrictions (change to the Position)
  - ✓ Effective Date is the retroactive reclass date

✓ Change Job (change to the Employee)
  - ✓ Effective date of the retroactive reclass
  - ✓ Effective dates for other salary changes since the retro reclass date
  - ✓ Current effective date for current salary

✓ **In Phase II—NOW!**
  - ✓ **Need each segment of the salary changes in order for the automated payroll adjustments to work**

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Retro Reclass Process **With Workday Timekeeping and Payroll**

✓ Edit Position Restrictions (change to the Position)
  ✓ Effective Date is the retroactive reclass date

✓ Change Job (change to the Employee)
  ✓ Effective date of the retroactive reclass
  ✓ Effective dates for other salary changes since the retro reclass date
  ✓ Current effective date for current salary

✓ **Calculation of Retro Pay**
  ✓ Need each segment of the salary changes in order for the automated payroll adjustments to work (in step above)
  ✓ Effective dates before May 25, 2016, manual calculation, One-Time Payment Event
  ✓ Effective dates of May 25, 2016 and later, system will calculate and pay in the next payroll cycle

One Time Payment Event

- This payment event should only happen after **all** reclass transactions have been completed and approved, for the position and the employee

- Use this event for retroactive reclass effective dates prior to May 25, 2016

- Manually calculate the full retro amount owed to the employee, as you do today for all retroactive reclass situations

- Currently set up for HRC or HRP to initiate, but we will discuss with the PAC to see if other roles should have access to initiate

- In the event:
  - Use the current date as the effective for the One-Time Payment Event, **not** the reclass effective date
  - Make sure you have the correct employee

Request One-Time Payment

Compensation	Request Compensation Change
Job Change >	**Request One-Time Payment**
Organization >	
Payroll >	View Compensation
Payroll Interface >	View Compensation History
Personal Data >	View Compensation History - All Past and Present Positions
Talent >	View Compensation Basis Details
Time and Leave >	View Estimated Compensation for a Period
Worker History >	View Reimbursable Allowance Plan Activity

Request One-Time Payment

Effective Date	*	MM / DD / YYYY
Employee	*	
One-Time Payment Plan	*	

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Request One Time Payment

Effective Date * 05 / 12 / 2016

Reason   × Retro-Reclass > Retro-Reclass Payment

Current Organizational Assignments

Cost Center: 250102001000--- DBM OPSB Executive Direction [SP 000] [Pseudo ---]

Location: Baltimore - 301 W. Preston St

Payment Details

One-Time Payment Plan *   × SPMS Retro-Reclass Payment

Amount   * 1,000.00

Currency   * × USD

Supporting Information

Gross Up	
Currency	USD
Frequency	Annual
Target Amount	0.00
Target Currency	USD
Recommended Minimum	0.00
Recommended Maximum	0.00

Worktags

Worktags

Send to Payroll   ✓

Additional Information

Submit   Save for Later   Cancel

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Retro Reclass Example

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Event Details:

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Viewing Compensation History**:**

After the Retroactive Reclass

Pay Change History   3 items

Effective Date	Compensation Action	Reason	Total Base Pay	Primary Compensation Basis	Currency	Frequency
01/01/2015	Ad-hoc Compensation Change	Request Compensation Change > Salary Plan Add/Change (DBM Use Only) > COLA (DBM Use Only)	58,276.00	58,276.00	USD	Annual
12/01/2014	Promotion Compensation Change	Promotion > Reclassification > Reclassification - Reclassification Study	60,959.00	60,959.00	USD	Annual
07/01/2014	Ad-hoc Compensation Change	Request Compensation Change > Conversion > Conversion	57,133.00	57,133.00	USD	Annual

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Viewing Compensation History:

After the additional Current Effective Date Comp Change

Pay Change History 4 items

Effective Date	Compensation Action	Reason	Total Base Pay	Primary Compensation Basis	Currency	Frequency
09/16/2015	Ad-hoc Compensation Change	Request Compensation Change > Salary Adjustment > COLA/Increment Retro Update	62,179.00	62,179.00	USD	Annual
01/01/2015	Ad-hoc Compensation Change	Request Compensation Change > Salary Plan Add/Change (DBM Use Only) > COLA (DBM Use Only)	58,276.00	58,276.00	USD	Annual
12/01/2014	Promotion Compensation Change	Promotion > Reclassification > Reclassification - Reclassification Study	60,959.00	60,959.00	USD	Annual
07/01/2014	Ad-hoc Compensation Change	Request Compensation Change > Conversion > Conversion	57,133.00	57,133.00	USD	Annual

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Viewing Compensation History **after Phase II**

After the Retro COLA Update

Pay Change History 5 items

Effective Date	Compensation Action	Reason	Total Base Pay	Primary Compensation Basis	Currency	Frequency
09/16/2015	Ad-hoc Compensation Change	Request Compensation Change > Salary Adjustment > COLA/Increment Retro Update	62,179.00	62,179.00	USD	Annual
01/01/2015	Ad-hoc Compensation Change	Request Compensation Change > Salary Adjustment > COLA/Increment Retro Update	62,179.00	62,179.00	USD	Annual
01/01/2015	Ad-hoc Compensation Change	Request Compensation Change > Salary Plan Add/Change (DBM Use Only) > COLA (DBM Use Only)	58,276.00	58,276.00	USD	Annual
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07/01/2014	Ad-hoc Compensation Change	Request Compensation Change > Conversion > Conversion	57,133.00	57,133.00	USD	Annual

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Examples:

Transaction Type	Effective Date	Grade	Step	Salary	New Grade	New Step	New Salary
Current Grd/Stp/Salary		11	6	39,341			
Retroactive Reclass	2-01-14	11	4	36,549	13	4	41,358
COLA/Inc	4-01-14	11	5	37,878	13	5	42,880
COLA/Inc	7-01-14	11	5	37,878	13	5	42,880
COLA/Inc	1-01-15	11	6	39,341	13	6	44,545
Retro COLA/Inc Update (New Grade/Step/Salary forward)	4-8-15				13	6	44,545

Workday will need to know the salary rate:
From 2-01-14 to 3-31-14
From 4-01-14 to 6-30-14
From 7-01-14 to 12-31-14
From 1-01-15 to current date of the process

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Acting Capacity

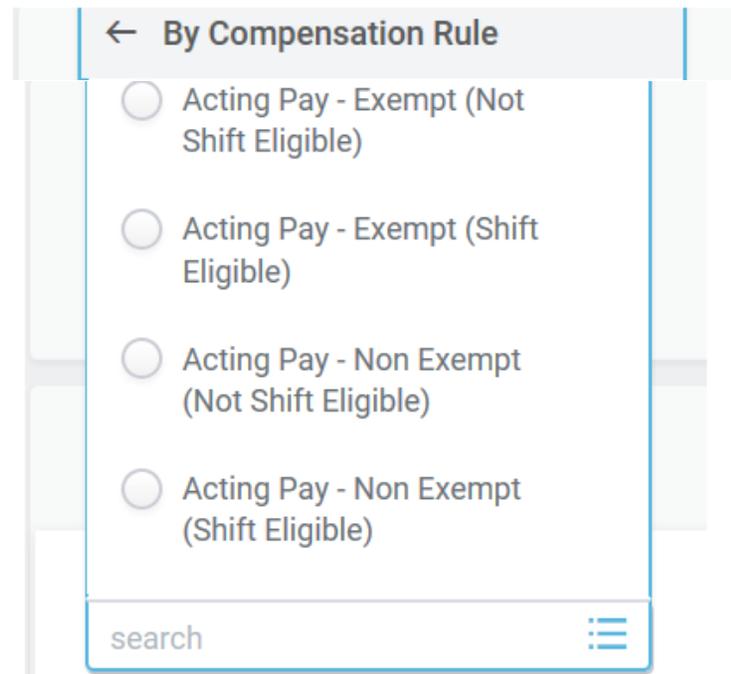# Acting Capacity Changes

- **Allowance Row Only**

- **Type of Acting Capacity**
  - Exempt, Not Shift Eligible
  - Exempt, Shift Eligible
  - Non-Exempt, Not Shift Eligible
  - Non-Exempt, Shift Eligible

- **Actual End Date**
  - Required at go-live
  - Not on Salary Row

Acting Capacity Event

- ## Reasons
  - Different reasons will allow the system to calculate overtime and shift differential correctly
  - Selecting the wrong reason will cause the employee to be paid incorrectly

Acting Capacity Event

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Reporting**:**

- ✓ **In Progress Compensation Changes Report**
- ✓ **SPMS Compensation Changes Report**
- ✓ **Payroll Summary Reports**
- ✓ **One Time Payment History**
- ✓ **SPMS Acting Capacity Report**
- ✓ **SPMS Acting Capacity Current Report**