HR User FAQ - Compensation Workday Processing

What are compensation changes?

Any change made to an employee's pay. There are three types of compensation change transactions available in workday:

1. One-time payments: [Job Aid: Request One-Time Payment](#)
   a. There are eligibility rules in place for One-time payment *reasons* to match the One-time payment *plan* (send a ticket if you believe an employee should be eligible)
   b. They are infrequent payments such as bonuses
2. Salary changes: [Job Aid: Request Compensation](#)
   a. Salary Schedule *will default from Job Profile*
   b. Follow Salary guidelines on HR Officer's website
   c. The correct and complete forms need to be attached and they will need to be completed before the transactions are started
3. Allowances
   a. Allowance drop down menus on an employee's compensation transaction screen will be correlative with their Job Profile.
   b. Only the allowances specific to the employee's role will be approved for selection:
      1. Example – An accountant may not be eligible to receive a *Clothing Allowance*, and therefore it will not show as an available option on their Allowance Plan menu.

What guidelines should I follow to request the Acting Capacity Pay Allowance?

Quick Guide: Acting Pay

1. NCP should **NOT** be done in lieu of Acting Capacity OR Acting Capacity in lieu of NCP.
2. Assigning as acting manager alone **DOES NOT** trigger *Acting Capacity Pay, a corresponding salary change event must be completed.*
3. Verify there is only **one** active Acting Pay compensation line.
4. **Initial** acting capacity transaction requires a MS-345.

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5. <u>Use bi-weekly</u> only in Workday, not annual.
6. <u>Expected and Actual End dates</u> must match.
7. There is a <u>6 month limit</u> (per Acting Pay transaction).

What is the process for ending an Active Acting Pay Allowance?

- You must end the Acting Capacity pay with a separate compensation transaction, **before** any transactions <u>that DO NOT include a compensation change step</u> (*lateral transfers or terms*).
- Workday should end the Acting Capacity pay **during transactions** that DO include a compensation change (*Promotion, Reclassification or Non-Conversion Transfers*). You should check this when completing the compensation change step of the process.

How do I input a Retroactive Compensation transaction?
Job Aid: [Retro Compensation Guide](#)

It is important to follow the proper steps when putting in a retro compensation request to ensure that they pay calculations are accurate:

1. Identify what compensation adjustment is missing with accurate transaction information:
   a) effective date
   b) **adjustment type** (HR Transaction or Comp Change)
2. Create a reverse timeline to identify compensation steps needed to bring employee to correct, current Grade & Step
3. Enter the compensation request transactions in order from oldest to most recent, using the correct progression dates and grade/step assignments

How do I use the <u>PAY CHANGE HISTORY</u> tab during the retro comp process?

- ✓ To identify what transactions will be affected (see what comp changes have happen after the retro date).

✓ To plan what order to input the transactions (earliest to most recent).

✓ To make sure the story of the employee makes sense (ex: if you put in a promotion, the money should increase).

What is the No Retro Processing Prior to Date and what do I do if I get it?

This error identifies a date that Workday will not process retro comps prior to, for this employee. This is a WALL. If the effective date is prior to this date, you should use the earliest date possible and process the remaining time manually through payroll input.

What if I receive the error notification indicating that other business processes are preventing the retro compensation transaction?

1. Make a note of what transactions are stopping the process with details and dates.
2. Put in a ticket to request these processes be rescinded.
3. Complete ALL necessary compensation change transactions.
4. Put in a second ticket requesting to put the rescinded transactions back into the system with details and dates needed.

5. Be aware of any outstanding comp changes, be sure that they are completed, will stop ASRs, NCP, and COLAs.

6. Each comp change transaction must be completed and approved before another comp change can be entered.

What do I do if Workday says there's an issue with the Salary Schedule?

1. If the Grade/Salary Schedule doesn't match up with the Bargaining Status, then you will receive the following error:

Error

1. Page Error
   - Barg Unit ABCDFH Restricted to New Schedule on/after 1/1/2020   (Employee Compensation Event For Ad Hoc)

➢ You will need to change the Bargaining Unit or the Grade/Salary Schedule:

Example: If Job Profile is in "F" bargaining unit, Salary Schedule will default to *Bargaining Unit Employees in Units A, B, C, D, F and H* and grade profiles = *ASTD*

However, If *Bargaining Status* is:

▪ **'yes'** then Grade/Salary Schedule should be *Bargaining Unit Employees in Units A, B, C, D, F and H* and grade profiles = **ASTD (the default is correct)**

▪ **'no'** then Grade/Salary Schedule should be *Standard Schedule* and grade profiles = **STD (the default is not correct)**

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2. You may receive an ALERT:

Alert

1. Alert

The compensation grade for this worker does not match the compensation grade from the job profile. The job profile returned

➤ You will need to review the Bargaining Unit or the Grade/Salary Schedule:

Example: If the Job Profile is <u>NOT</u> in a bargaining unit, Salary Schedule will default to **Standard Schedule** and grade profiles = **STD**

➤ If Salary Schedule **is Bargaining Unit Employees in Units A, B, C, D, F and H** then, **Bargaining Status** may be *"yes"* or *"no"*

What guidelines should I follow when terminating an employee to ensure their payroll and final payouts are completed successfully?

1. **Termination effective date** will be the last day that the employee's timesheet has work or leave hours to be paid

2. **Pay through date:**
   o The pay through date is *ALWAYS* the <u>last day of a pay period</u>.
   o The pay through date is the *pay period in which <u>unused Annual and Compensatory time is paid</u>*, when applicable.
   o The pay through date should be *<u>two full pay periods</u> AFTER the employee's termination date* on payroll.
   o When the termination date has passed (*Retro Termination*), use *two full pay periods* <u>from the date entered not from the termination date.</u>
   o If the termination is not processed within the pay period of the term date, then **it's a manual process for the pay out through input**.

3. **Follow this basic checklist when terminating employees:**
   - ✓ Make sure all leave requests have been submitted and approved, prior to pay through date
   - ✓ Ensure any time or leave corrections have been submitted and approved prior to pay through date.
   - ✓ Ensure salary is correct, any allowances, acting pay stopped.
   - ✓ Do not remove leave balances until you confirm via check register that the leave was paid out properly; once confirmed, remove all balances.
   - ✓ Retirements cannot be effective in a month where an employee was active and received compensation for work or paid leave time.

What are things that would prevent employee payouts from being processed?

   » Retro termination
   » Incorrect pay through date
   » No beginning balance for annual leave
   » Not returned from unpaid LOA

What are the guidelines around the Pandemic Carryover time?

[Pandemic Time Off Quick Guide](#)

1. All earned comp time in 2021 will show in the *Pandemic Carryover Time Off Plan balance*, NOT in Comp Time.
2. Employees will use it as they do other leave.
3. This leave **will not expire and cannot be paid out** when leaving state service.

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4. Employees leaving employment in 2021 that have earned comp hours in 2021, _can be paid out for up to 16 comp hours of their 2021 earned Comp_.

    **Please reference the **Pandemic Time Off Quick Guide** above for more information on the complete process.

What are some Helpful SPMS Reports when processing Compensation transactions in the Workday system?

- SPMS Salary Schedule
- SPMS Compensation Changes
- SPMS One-Time Payment
- SPMS Salary Adjustments
- SPMS Current Acting Capacity
- SPMS Acting Pay
- SPMS SLEOLA Allowance Plan Assignments
- SPMS Unsubmitted Time and Time Off in a Period - State/Regular
- SPMS Unsubmitted Time and Time Off in a Period - Contractuals
- SPMS Leave Payouts Report _(run by Payroll or Timekeeper)_

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